



SUPERVISOR

# PERFORM ESTIMATED WORK

Provides guidance for reviewing and completing a “Perform Estimated Work” Work Task.

## GETTING STARTED

**Customer Service** is responsible for receiving and routing **NU Facilities Estimate Requests**. Once an **Estimate Request** is received, Customer Service will review the request and route it to the appropriate workgroup(s) along with the **Estimate Form**. Once the new **Work Task** has been created under the **Perform Estimated Work Request Class**, **Customer Service** will again assign the **Work Task** to the appropriate shop.

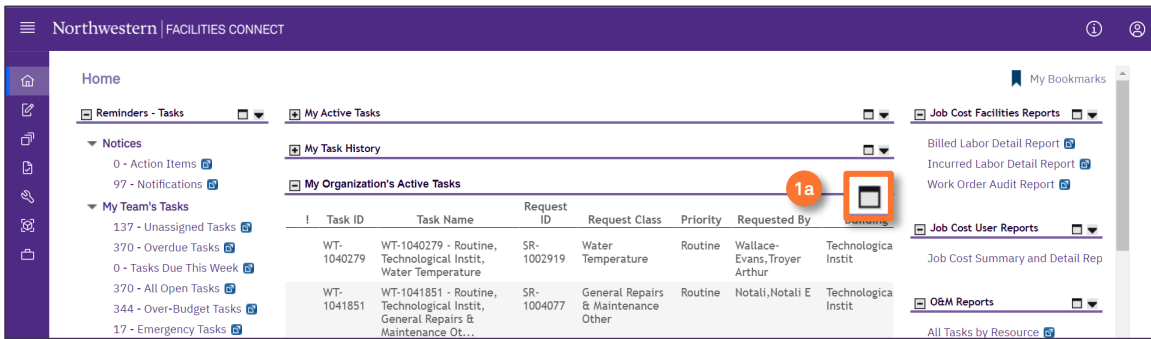
This job aid begins on the Facilities Connect **Task** screen. For more information on navigating to the **Tasks** screen, please refer to the **Supervisor: Tasks Screen** job aid.

## DIRECTIONS:

1

To locate the new **Work Task**, from the **My Organization’s Active Tasks** section:

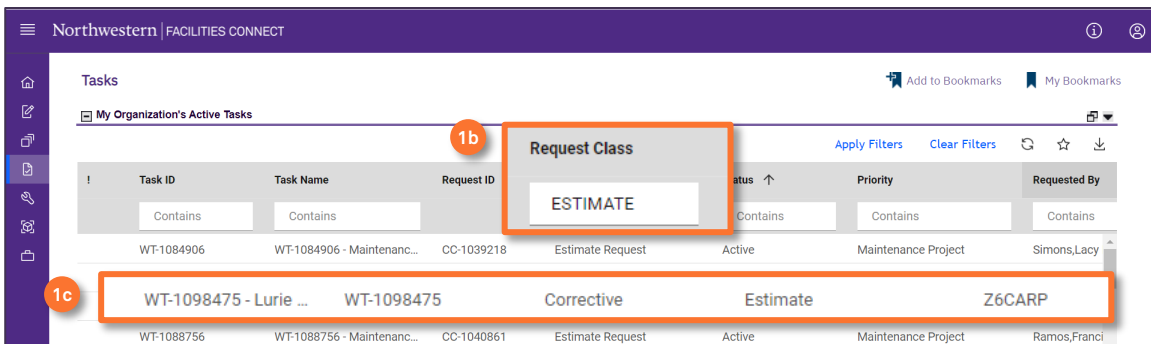
1a Click on the **Maximize** button.



Upon clicking, the full screen view of **My Organization’s Active Tasks** will open. To locate the **Estimate Request Work Task**:

1b Enter **Estimate** into the Request Class column and press enter. Layer search filters if necessary.

1c Once you have located the desired Work Task, click on the **Work Task Record** link to open.



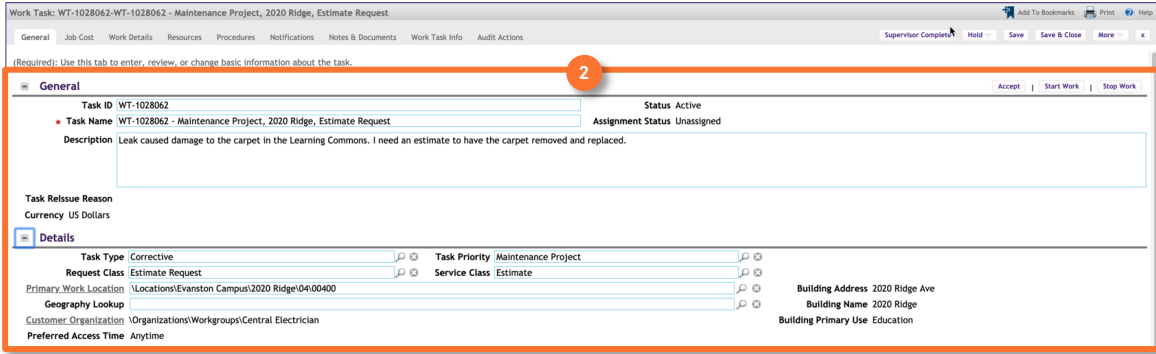


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## DIRECTIONS:

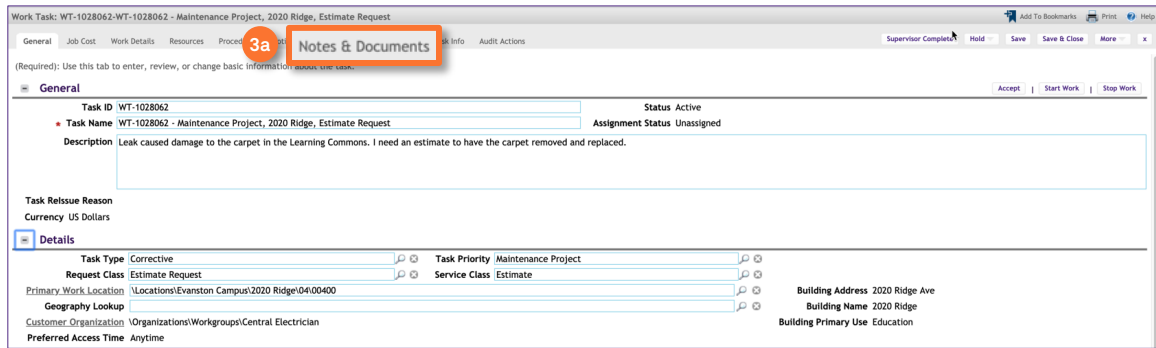
2 Upon clicking, the selected **Work Task (Perform Estimated Work)** will open:

2 Review the general details and description of the request to confirm there have been no changes to the work requested.



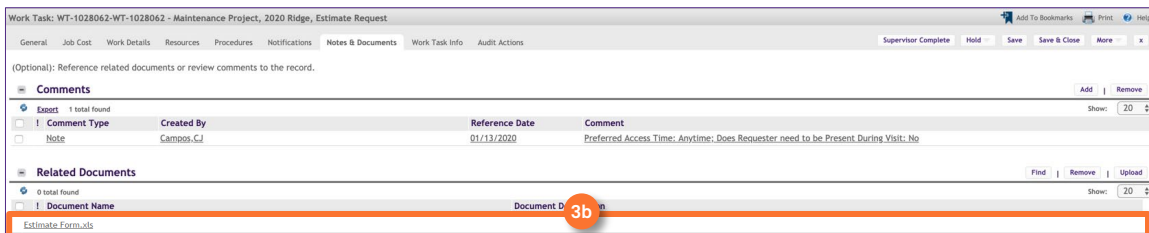
3 Next, confirm the details of the work in the **Estimate Form**. To open the **Estimate Form**:

3a Click on the **Notes & Documents** tab.



Upon clicking, the **Notes & Documents** tab will open. In the **Related Documents** section, locate the **Estimate Form**:

3b Click on the link to open the **Estimate Form**.



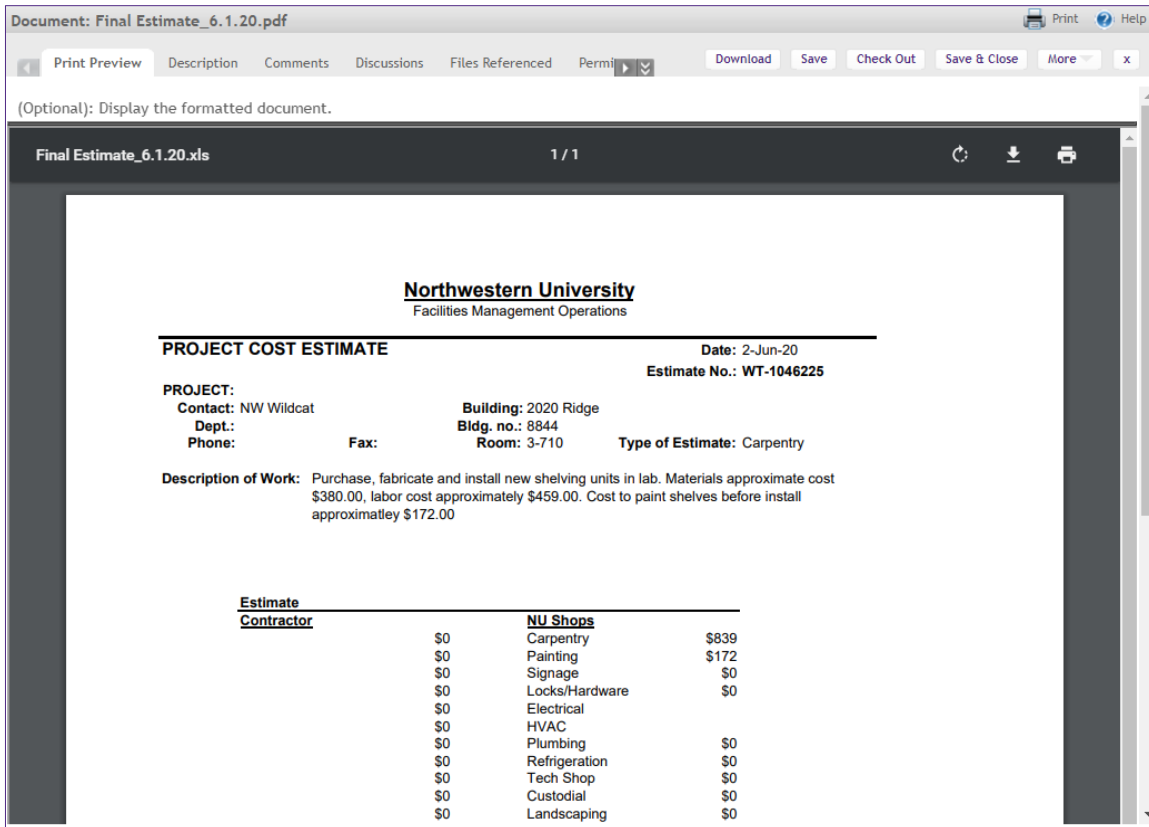


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## DIRECTIONS:

**3** *Continued.*  
Upon clicking, the **Document** pop-up window will appear.

**3c** Review the completed **Estimate Form** and verify the details are correct.



### ▼ INFORMATION

Once you have validated the information in the **Work Task** and the attached completed **Estimate Form**, complete the work through your shops standard process.

If other shops are involved, you will need to add additional **Resources** and/or shops to the **Work Task**. For more information on adding **Resources** to a **Work Task**, refer to Job Aid #XX **Assign Work Tasks to Resources (Desktop)**.